

Commonwealth of Kentucky
Kentucky Department of Revenue

2D BARCODE PROGRAM

Software Developer's Guide



Tax Year 2015
Processing Year 2016

Version 1.0
August 25, 2015

Table of Contents

Section 1: Introduction	4
Section 2: Contact Personnel - Kentucky Department of Revenue	5
Section 3: Barcode Content.....	6
Section 4: Kentucky Testing Procedures	8
Section 5: Mandatory Barcode Fields.....	9
Section 6: 2D Barcode Layouts.....	10

Revision Log

Version	Date	Nature of Change
1.0	9/8/2015	Posted to website

Section 1: Introduction to Kentucky 2-D Barcoding Program

The Kentucky Department of Revenue will be accepting 2-D barcodes on the Form 740, Form 740-EZ and 740-NP Individual Income Tax Returns for tax year 2015. This is a great opportunity to improve the service provided to the taxpayers of Kentucky.

The benefits include:

- Reduction in processing time; saving Kentucky taxpayer dollars.
- Fewer data entry errors, since all data listed on the return is included in the barcode.
- Fast access to taxpayer information; better assistance to the taxpayer.

We would like to thank the software community that support the development of the 2D barcode for Kentucky and welcome your comments or suggestions for improving the 2D barcode process.

For tax year 2015, the Department of Revenue will develop one version of the primary individual income tax forms, to be used for the software developers for computer generated returns. The computer generated forms are designed for the 2-D barcode format. If the 2-D barcode is not printed on the form, the space allotted for the barcode should be left blank.

Additional information regarding 2-D barcodes used for tax forms is available on the Federation of Tax Administrators (FTA) web site at www.taxadmin.org.

The Form 740-EZ, Form 740, Form 740-NP forms are available on our website: <http://revenue.ky.gov/sdi/sfd.htm>

If you need a copy of any of the forms sent via email or postal mail, send a request to the contacts listed in this document.

New for Tax Year 2015

Form 740-V

If the taxpayer is paying by check or money order, the Form 740-V – Kentucky Payment Voucher must accompany the check/money order. Kentucky requests that a Form 740-V be provided via your software at the time the Kentucky return with an additional tax due is printed. The name on the Form 740-V and Kentucky tax return should be an exact match.

Form 740-NP

The two barcodes for Form 740-NP, line 6 have been removed. If a taxpayer is a full-year resident of a reciprocal state with Kentucky income of wages and salaries only then a Form 740-NP-R must be filed.

Section 2: Contact Personnel- Kentucky Department of Revenue

Technical Specifications/Assistance and Acceptance Testing

Help Desk: 502-564-5370

Primary Contact:

Richard J. Hill
Kentucky Department of Revenue
Division of Operations
Electronic Commerce Branch
501 High Street, Station 22
Frankfort, KY 40601-2103
Phone: 502-564-7926
Email: RichardJ.Hill@ky.gov

Secondary Contact:

Audrey J. Terry
Kentucky Department of Revenue
Division of Operations
Electronic Commerce Branch
501 High Street, Station 22
Frankfort, KY 40601-2103
Phone: 502-564-7862
Email: AudreyJ.Terry@ky.gov

Additional Information:

Software Developer's Information webpage (<http://revenue.ky.gov/sdi/>)

Kentucky Publication 1345 – Handbook for Electronic Filers of Individual Income Tax Returns (This publication can be found through the following web page:
<http://revenue.ky.gov/taxpro/elf.htm>)

Section 3: Barcode Content

2-D Barcode Content

The Form 740/740-EZ and 740-NP are developed in a separate barcode layout for those vendors that wish to support the 2D barcode of one but not the other form.

The 2-D barcode for the Form 740/740-EZ will include the following forms if they are a part of the taxpayer's return:

- 740-EZ – Kentucky Individual Income Tax Return for Single Filers
- 740 – Kentucky Individual Income Tax Return for Full Year Resident
- Schedule M – Federal Adjusted Gross Income Modifications
- Schedule A – Kentucky Itemized Deductions
- Schedule P – Kentucky Pension Income Exclusion
- Form 2210-K – Underpayment of Estimated Tax by Individuals
- Form 5695-K – Energy Efficiency Products Tax Credit
- Form 8863-K – Education Tuition Tax Credit
- Form W-2 – Wage and Tax Statement
- Form 1099-R – Distributions from Pension, Annuities, Retirement...

The 2-D barcode for the Form 740-NP will include the following forms if they are a part of the taxpayer's return:

- 740-NP – Kentucky Individual Income Tax Return for Nonresident or Part-Year Resident
- Schedule ME – Moving Expense and Reimbursement
- Schedule A (Form 740-NP) – Kentucky Itemized Deductions
- Form 8863-K – Education Tuition Tax Credit
- Form 5695-K – Energy Efficiency Products Tax Credit
- Form W-2 – Wage and Tax Statement
- Form 1099-R – Distributions from Pension, Annuities, Retirement...

All data formats follow the criteria published in the “Tax Forms Processing 2-D Barcoding Standards Guidance” issued by the Federation of Tax Administrators (FTA). Note: Hyphens and separators should not be used in dates, social security numbers, telephone numbers, etc.

The name field on the return should be broken down by field as described in the tax form layout specifications.

For check boxes return “X” if checked and NULL if blank.

The barcode for the Form 740-EZ must be printed using the Form 740 layout.

If Form 740-EZ is printed, the following fields in the 740 format must be prefilled. Field 21 must equal "X", Field 64 must equal "X", Field 154 must equal "X", field 162 must equal "01", Fields 172 and 174 must equal "01".

If Form 2210-K is completed, field 97 must be marked "X".

Section 4: Kentucky Testing Procedures

A contact name and email address must also be provided for test result notification. **After your software is accepted, an acceptance letter will be issued which must be provided to all software users upon request.**

The 2D test scenarios are typically available in late August/early September. The 2D test scenarios can be found on the following webpage: <http://revenue.ky.gov/sdi/2dbar.htm>

The 2-D barcode test scenarios may differ from the scenarios used for ATS.

Please see Section 5 for list of required fields that must be completed by the taxpayer. If the software community could alert the taxpayer that these fields are required to process the return, and if not completed, will result in the delay of the return being processed, it would be appreciated. We realize that there is no way to control when the taxpayer prints the return but alerting the taxpayer when a required field is not completed could be beneficial.

Section 5 – Mandatory Barcode Fields

- **Primary Social Security Number** – Required on all returns. Must be 9 digits.
- **Spouse Social Security Number** – Required on Married Filing Joint and Married Filing Separately on a Combined Return filing statuses. Must be 9 digits.
- **Primary Last and First Name** – Required on all returns.
- **Spouse Last and First Name** - Required on Married Filing Joint and Married Filing Separately on a Combined Return filing statuses.
- **Address, City, State Abb., Zip Code** – Required on all returns. This field should contain numbers 0-9 and letters A-Z. The only special characters permitted in the address are the “-“ dash and the “&” ampersand.
- **Filing Status** – One of the four (4) filing statuses is required.
- **Spouse Full Name** – Required if Married Filing Separate filing status is selected.
- **Political Party Fund** – One of the three (3) taxpayer political party fund options must be selected for all filing statuses. If married filing joint or married filing separate on a combined return filing status is selected, one of the taxpayer and spouse political party fund options must be selected.
- **Regular Credit Taxpayer** – Required for all returns.
- **Regular Credit Spouse** - Required on Married Filing Joint and Married Filing Separately on a Combined Return filing statuses.
- **Credit Total Fields** – Must be two (2) characters. (1 = 01, 5 = 05, etc.)
- **Taxpayer Tax Credits** – Required entry for all returns. If single, married filing joint or married filing separate return filing status is selected, this field must equal Total Tax Credits Field.
- **Spouse Tax Credits** – Required on Married Filing Separately on a Combined Return filing status. The Total Tax Credits must be split between the taxpayer and spouse and must equal the Total Tax Credits Field. Taxpayers may determine how to split the credits but each field must be a minimum of 1.
- **All Money Fields** – All money fields must be rounded to the nearest dollar. The barcode field must contain **whole dollars** only with no special characters. Special Characters are defined as any character other than numbers 0 through 9. No “\$” or “.” should be included in the barcode. The only exception to this would be the “-“ in front of a negative dollar amount.

Section 6 – 2D Barcode Layouts

The 2D barcode layouts for the Form 740/Form 740-EZ and Form 740-NP can be found on our website: <http://revenue.ky.gov/sdi/2dbar.htm>

See highlighted fields on barcode layouts for additions and changes for tax year 2015.